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ABSTRACT

This report considers the issues of gifts, donations, collection development, long-range planning, and budget constraints which arose as a consequence of a collection development study undertaken for a public library system serving a population in excess of 200,000. Gifts to the general collection are distinguished from gifts to special collections; special collections are defined; criteria for donations of earmarked funds or special collections of materials are enumerated; situations in which gifts would serve a public relations function are considered; and means of determining areas of need that should be addressed by special collections are discussed. A Special Collection Proposal Form containing guidelines for evaluating a proposed special collection is appended. (KM)

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GIFTS, DONATIONS AND SPECIAL COLLECTIONS FOR LIBRARIES

ED277369

by

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August, 1986

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GIFTS, DONATIONS AND SPECIAL COLLECTIONS FOR LIBRARIES

The author was recently engaged to conduct a collection development study for a public library system serving a population in excess of 200,000. For this study a gap was found in the information available from traditional library literature and information sources. The client needed to tie the issues of gifts, donations, collection development, long-range planning and limited materials budget into a cohesive plan that provided a framework for policy and implementation. The library system was aware of needed information for the community that it could not adequately provide within the constraints of its annual materials budget allocation. Many of these needs might fall within the concept of special collections.

In a general sense all possible donations to a library can be defined as "gifts." Donations are split into two categories: funds to buy materials and materials themselves. The first category is:

> Materials to be donated/purchased are of the same nature that are currently purchased for the general collections. They meet all criteria of the current selection, collection development and gift policies. They do not require special care or considerations beyond those required by other materials currently being purchased.

In Category Two, gift opportunities may vary from the characteristics of Category One gifts and yet have significant community/library service value. These typically will fall under the milieu of "special collections."

At times libraries may have opportunities to seek and/or accept donations of money earmarked for spending on special collections in certain subject areas. The same type of opportunity that is to be subsequently maintained by the receiving library. Special collections fall outside the general collection in one or more of the following ways.

1. Interest in the materials falls outside the realm of popular demand.
2. Content is relative to a specific, narrow topic.
3. Materials are of historical significance.
4. Current value is above original purchase cost.
5. Collection is housed together as a unique set of materials within the library.
6. Use is geared to a specific segment or segments of the community.
7. Materials are in a unique format.
8. Materials are unique in character (e.g. local subjects).
9. Materials are of such a monetary value, fragile nature, or historical significance that they require special handling, storage and control of use.

10. One or more staff members with specialized training, skills, or knowledge need to be available to properly manage the collection.
11. Collection is of such a nature as to require joint management between the library and another agency or organization.

Donations of earmarked funds or special collections of materials should meet the following criteria.

1. The materials will meet identified community needs.
2. The identified needs are estimated to be of sufficient duration to warrant dedication of library staff time, processing materials and shelving space.
3. Services provided by the special collection will not duplicate or unnecessarily compete with other library or information services existing in the community.
4. The donor is willing to contract to pay for future updating and other collection maintenance for the anticipated length of time that the collection will be of use to the community.

   or

   The collection meets a strong unmet current need, such that the library is willing to budget future money for partialor full collection maintenance.
5. The library retains control over the size and contents of the collection (including selection and withdrawal.)
6. The library retains the right to decide where and how a collection will be housed.

7. The donor does not impose any unacceptable constraints. Such constraints might be that the library give the donor or members of a donor organization preferredstatus in borrowing or use, or that the library would guarantee the collection occupy a certain space within the library of the donor's choice, or that the materials be held indefinitely no matter how community needs change.

Funding for a special collection offered by an individual or organization should be examined on the basis of the preceding guidelines. However, there may be the additional consideration of library public relations in evaluating some offers. If the gift meets most or all of the preceding criteria, then the library can receive a valuable gift and generate favorable publicity as well. In cases that a gift meets few of the criteria but represents a significant community public relations situation, the library should consider accepting the gift, if it can:

1. Limit the library's responsibilies to cataloging and storing the materials.
2. Control the amount of the donated materials within economic and physically manageable limits.
3. Limit the collection's life span to as short a time period as deemed desirable.
4. Avoid constraints on the library's handling of the collection.

5. Clearly document the time limits and library responsibilities for maintenance and continuation of the collection.

In all instances of accepting special collection donations, precise documentation of the agreement should be made by the receiving library. Factors, such as statements of whom the collection is intended to serve, how long it is estimated to be of useful service, constraints to be recognized in its use and perpetuation, (estimated long- and short-term cost?) should be included in documentation. In these times of restrained budgets it is possible to find the consideration of a special collection competing for library funding with the needs of the mainstream part of the overall materials collection. A well-planned and conducted program of seeking donations for special collections can potentially avoid this conflict.

Areas of need that possibly should be addressed by special collections should be identified by the library through periodic reviews of surveyed community needs, materials use information and information about the community through other sources. Examples of these sources are:

1. Periodic review of surveyed community needs by the library should include surveys of the community at large. These studies should establish the library's success in meeting current needs for materials and attempt to establish future trends.

2. The library should frequently evaluate use of the materials collection through reviewing lending of materials, in-library use by citizens and use by library staff in providing information.
3. Trends that may likely affect future library materials required by the community agencies and information from state and national agencies.
4. Suggestions from community individuals or groups should be encouraged and actively gathered by the library.

Criteria for seeking donations for special collections should be similar to those established for accepting unsolicited donations. Procedures for evaluating a potential gift and accepting/declining need to be established. Persons who will successfully, actively seek gifts need to be capable of communicating the need for the special collection in a clear persuasive manner, have good human relations skills, be able to speak with sufficient knowledge of the collection, understand the reason for its need and know how it is proposed to be used.

There should be a centralization of decision making authority regarding what special collections will be sought (or accepted), how collection gifts will be sought, from whom, and so forth. The work of the authority, its procedures and information needs should be well known to all library staff, including evaluations of proposals and coordination of efforts to solicit gifts. A copy of the definitions of a special collection (as listed

earlier) and a list of already identified special collections that are needed should be supplied to staff who are empowered to suggest or accept suggestions for special collections.

The guidelines for evaluating a proposed special collection are expressed in the following form that would be supplied to library staff for use in proposing such a collection. The form could be used by staff in proposing a suggestion of their own or those of community individuals or groups. The guidelines would be printed as a part of a Special Collection Proposal Form or provided as a set of instructions for the form. The proposed form shown is intended to primarily illustrate the organization, style and content that should be adopted. The actual form adopted would require significantly more space for responses.

The approaches to donations and special collections generated here should be useful to public libraries serving all sizes of communities with varying levels of funding.

SPECIAL COLLECTION PROPOSAL FORM

In order to consider accepting or soliciting a special collection of materials, or funds for such a collection, a staff member must submit the attached form to the Collection Development Committee. The Committee will meet with the staff member to develop a final recommendation to the Director of Libraries. If a patron or organization wishes to donate a special collection, the patron or an organization representative is requested to work with the staff member developing this proposal.

If additional space is needed, please add pages to this form.

I. Description of the proposed collection (subject, format, approximate number of items, etc.).

II. What characteristics categorize this as a Special Collection? (Refer to Special Collection Definition.)

III. If the collection is geared to a specific segment(s) of the community, identify the segment(s).

IV. How often is it estimated the collection will be used during the year? (Daily, weekly, monthly, rarely, etc.)

V. How would the materials be used: (Loaned, in-library use by the public, used by library reference staff)

VI. Identify community need this collection will satisfy.

VII. Is this a recently developed or long-standing need? How long?

VIII. How long will the need continue?

IX. Describe any documentation available which verifies this need.

X. Estimate first-year costs.
Acquisition?_____ Processing?_____ Staff?_____
Storage?_____ Other (specify)?_____

XI. What are the estimated on-going costs per year?
Acquisition?_____ Processing?_____ Staff?_____
Storage?_____ Other (specify)?_____

XII. What sources are available to either donate such a collection or to provide funds for its purchase?

XIII. What sources are available to provide on-going funds or other support for such a collection?

Staff member completing form:_____

Date:_____

Patron or organization representative:_____

Address:_____ Phone:_____